



Personal Touch Financial Services Ltd

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**Professional Indemnity Proposal Form – Consulting
Engineers Prop**

**Personal Touch Financial Services Ltd is authorised
and regulated by the Financial Services Authority**

Consulting Engineers

IMPORTANT NOTICE

This proposal must be completed and signed by a Principal, Partner or Director of the Proposer. The person completing and signing the form should be authorised by the Proposer to do so and should make all necessary enquiries of his fellow Partners, Directors and Employees to enable all the questions to be answered.

All questions must be answered to enable a quotation to be given.

Completing and signing this proposal does not bind the Proposers or insurers to enter a contract of insurance.

If there is insufficient space to answer questions, please use an additional sheet and attach it to this form (please indicate section number).

Consulting Engineers

Please complete this Proposal form in **BLOCK CAPITALS** to avoid problems when transmitting by fax.

1) NAME/S (including trading names) of the Proposer/s: use a separate sheet if necessary

Name	Date Commenced

Website Address:

Email Address:

2) Is cover required for predecessor practices to the Proposer/s?

YES	NO
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If YES, please provide full details:

Name of Predecessor	Date Commenced	Date Ceased	Reason for Cessation

3)

Name in full of all Principals	Qualifications	Date Qualified	How long as a Principal with Proposers

4) Is cover required for the previous business activities of any Principal?

YES	NO
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If YES, please state:

Name of Principal			
Name of Previous Firm			
Period	From / / To / /	From / / To / /	From / / To / /
Fees for Last 3 Yrs	Y/E / / £ Y/E / / £ Y/E / / £	Y/E / / £ Y/E / / £ Y/E / / £	Y/E / / £ Y/E / / £ Y/E / / £
Reason for Leaving			
Position in Firm			
Is there separate insurance covering the activities of this Firm for the Period stated above?			

5) PROFESSION/BUSINESS of the Proposer/s:

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6) ADDRESS/ES of Proposer/s

All addresses must be shown together with the Principal responsible for the work at each office:

Address	Principal in charge

7) DO NOT ANSWER IF PROPOSAL IS FOR RENEWAL OF INSURANCE WITH

Name of Current Insurers	
Name of Broker	
Renewal Date	
Limit of Indemnity	
Premium	
Excess	

8) Is cover required for any past Partner or Principal?

YES	NO
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If YES, please state:

Name	Qualifications	How long with Proposer/s

9) Please state total numbers of:

Principals		Draughtsmen	
Qualified staff		Trained staff	
Others			

10) Do you require any sub-contractor to be indemnified under your Insurance arrangements?

YES	NO
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If YES, please state:

Name	Qualifications	Fees paid (last financial year)

11) State for the whole Proposer/s

(a) Gross fees received for each of the last five financial years:

Year End				Last Year	Current Year	Next Year Estimate
UK Work	£	£	£	£	£	£
Overseas	£	£	£	£	£	£

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(b) Split of Gross Fees in the last complete financial year:

	UK Work	Overseas
Civil Engineering Consultancy	£	£
Structural Engineering Consultancy	£	£
Soil & Foundation Consultancy	£	£
Mechanical Engineering Consultancy	£	£
Electrical Engineering Consultancy	£	£
Heating & Ventilating Engineering Consultancy	£	£
Architectural Consultancy	£	£
Town Planning / Quantity Surveying	£	£
Structural Surveys	£	£
Valuations on Existing Property	£	£
Other work (give details)	£	£
TOTAL GROSS FEES	£	£

12) Does the Proposer/s engage in any of the following types of work?
If YES, please state percentage of gross fees in the last complete year derived from each type:

	YES	NO	%
Bridges/Flyovers/Tunnels/Dams/Mines	YES	NO	%
Harbours/Jetties/Sea Defences	YES	NO	%
Marine Surveys	YES	NO	%
Bulk Handling Equipment/Hoppers/Silos	YES	NO	%
Other Mechanical Plant/Equipment	YES	NO	%
Fertiliser/Ammonia/Urea Plants	YES	NO	%
Chemicals/Petro-Chemicals/Chemical or Oil Refineries	YES	NO	%
Nuclear/Atomic Projects	YES	NO	%
Sewerage/Water Schemes	YES	NO	%
Hospitals/Universities/Schools	YES	NO	%
Factories	YES	NO	%
Housing	YES	NO	%

13) Please state percentage of gross fees in the last complete year derived from each of the following:

Industrial Systems Building	%
Restoration Work	%
Reinforced/Prestressed Concrete	%
Soil Testing/Foundations/Piles/Underpinning	%
Government Departments	%
Local Authorities	%

- 14) During the last FIVE financial years, approximately what percentage of fee income is derived from:

Aborted work where nothing "physical" resulted	%
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- 15) Please state number of storeys in highest block completed during the last 10 years:

IF OVER 10 STOREYS, please give details:

- 16) Does the Proposer/s now or has the Proposer/s in the past undertaken any services which may create a liability for pollution or contamination?

YES		NO	
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If YES, please ask for a supplementary environmental questionnaire.

- 17) Are all contracts in writing?

YES		NO	
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If NO, please explain the circumstances in which you would not have a written contract.

- 18) If a client changes a specification during the course of a job, do you always confirm the change to the client in writing explaining that it was the client's decision and whether following, or against your advice as appropriate

YES		NO	
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If NO, please explain the circumstances in which you would not confirm a change in writing:

- 19) (a) Please give details of the five largest contracts where construction has commenced during the past six years:

Start Date	Description	Total Contract Value	Extent of Service	Approximate Completion Date
1				
2				
3				
4				
5				

- (b) Please give details of three largest contracts where construction is expected to commence in the next 12 months:

Start Date	Description	Total Contract Value	Extent of Service	Approximate Completion Date
1				
2				
3				

- 20) Please provide more details of the work undertaken in the past 3 years:

Please note 'own project value' refers to the total value of the proposer's proportion of the total project (not just the fee element)

(a) Civil Engineering

- (i) Average total single project value of jobs undertaken in last 3 years:

£

- (ii) Highest total single project value of an individual job in last 3 years:

£

- (iii) Highest own single project value of an individual job in last 3 years:

£

(b) Structural Engineering

- (i) Average total single project value of jobs undertaken in last 3 years:

£

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(ii) Highest total single project value of an individual job in last 3 years:

£

(iii) Highest own single project value of an individual job in last 3 years:

£

(c) Building Services Engineering

(i) Average total single project value of jobs undertaken in last 3 years:

£

(ii) Highest total single project value of an individual job in last 3 years:

£

(iii) Highest own single project value of an individual job in last 3 years:

£

21) Has the Proposer/s at any time undertaken any work where the "end product" is situated outside the United Kingdom?

YES NO

(a) If YES, please give details of the three largest:

Country	Start Date	Description	'Own' Contract Value	Total Contract value	Approximate Completion Date	Services Provided

(b) Does the Proposer/s work other than from its UK offices?

YES NO

- (c) Has the Proposer/s at any time accepted liability other than under the jurisdiction of the UK courts?

YES		NO	
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If YES, to either (b) or (c) then please provide full details listing jurisdiction and amount of work involved on a separate sheet.

- 22) (a) Is the Proposer/s or has the Proposer/s been a member of a consortium or group practice or engaged with any other party in a Single Project Partnership?

YES		NO	
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If YES, please give full details (including names of other parties)
Special arrangements must be made to cover this type of work

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- (b) Does the Proposer/s or any Principal have any association with or financial interest in any other Practice, Company or Organisation?

YES		NO	
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If YES, give full details of the nature of the association together with the name and business of the third party.

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- (c) Is the Proposer/s or any Principal or any related organisation engaged (either themselves or through sub-contractors) in:

- (i) Actual construction, fabrication or erection
- (ii) Property Development
- (iii) The manufacture, sale, leasing or distribution of any product or process

YES		NO	
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If YES, please give full details:

23) Do you require insurance for:

Loss of Documents	YES	NO	Limit £
Dishonesty of Employees	YES	NO	
Libel & Slander	YES	NO	
Collateral Warranties, Duty of Care Agreements etc	YES	NO	

Some policies give this cover automatically; Collateral Warranties, Duty of Care Agreements etc require special attention and should be discussed with your Broker.

24) (a) For what Limit/s of Indemnity are quotations required?

(b) There will be a minimum level of uninsured excess. Is a quotation required with a voluntary excess to achieve a premium saving? If so, for what level of excess?

25) (a) In respect of ANY of the risks to which this proposal relates, has any Claim been made (whether successful or not) against the Proposer or any past or present Principal?

YES	NO
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(b) Has any loss been suffered by the Proposer, any predecessor or any past or present Principal in respect of ANY of the risks to which this proposal relates?

YES	NO
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If YES, please give details:

Date of claim/loss	Brief details of each claim/loss	Cost of claim/loss	Estimated cost of claim/loss outstanding

(c) What steps have been taken to prevent a recurrence?

26) Is any Principal, AFTER FULL ENQUIRY, aware of any circumstance which might:

(i) Give rise to a claim against the Firm, any predecessor or any past or present Principal?

YES	NO
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(ii) Cause any loss to the Firm, any predecessor or any past or present Principal?

YES	NO
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(iii) Otherwise affect the consideration of this proposal for Insurance?

YES	NO
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If YES, to any of the above, please give details:

27) Has any proposal for similar insurance made on behalf of the Firm or any of the present or past partners, directors or principals, or on behalf of any predecessor to the Firm ever been declined or has any such insurance ever been cancelled or renewal refused?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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If YES, please give details:

Please read this paragraph carefully before signing the declaration:

It is essential that every Proposer or Assured when seeking a quotation to take out or renew any insurance discloses to the prospective Insurers all material facts and information (including all material circumstances) which might influence the judgement of an Underwriter in deciding whether to accept the risk and on what terms. The obligation to provide this information continues up until the time that there is a completed contract of insurance. Failure to do so entitles the Insurer, if they so wish, to avoid the contract of insurance from inception and so enables them to repudiate liability thereunder. If you have any doubt as to what constitutes a material fact or circumstance please do not hesitate to ask for advice.

DECLARATION

I/we declare that, after full enquiry, the contents of this proposal are true and that I/we have not misstated, omitted or suppressed any material fact or information. I/we agree that this proposal together with any other information supplied by me/us shall form the basis of any contract of insurance which may be effected. If there is any material alteration to the facts and information which I/we have provided or any new material matter arises before the completion of the contract of insurance, I/we undertake to inform insurers.

I/we hereby consent to any information I/we have provided being processed by you for the purposes of providing insurance and claims handling, which may necessitate sharing such information with third parties. HCC International Insurance Company PLC may use this information for marketing (by post, telephone, e-mail or fax) subject to the conditions of the Data Protection Act. If you do not wish these details to be used for marketing please inform HCC International Insurance Company PLC in writing. Under the Data Protection Act 1998 you have the right to access or amend the information we hold about you. If you would like to exercise either of these rights please contact HCC International Insurance Company PLC.

Signature of Principal:

Date:

A copy of this proposal should be retained by you for your own records.